

**2024**

# MEDICAL WORKSHEET

DO YOU ITEMIZE? YES/NO

you can only deduct unreimbursed medical expenses that exceed 7.5% of your adjusted gross income (AGI), found on line 11 of your 2024 Form 1040. For example, if your AGI is \$50,000, the first \$3,750 of qualified expenses (7.5% of \$50,000) don't count.

7.5% x Your AGI \_\_\_\_\_ = \_\_\_\_\_

DO YOU THINK YOUR MEDICAL EXPENSES ARE MORE THAN THIS AMOUNT? YES/NO

\*IF YOU HAVE A HEALTH SAVINGS ACCOUNT OR MEDICAL SAVINGS ACCOUNT, YOU CANNOT USE COSTS THAT WERE PAID WITH THESE FUNDS, YOU ALREADY RECEIVED A TAX BREAK

a.) INSURANCE PREMIUMS: Medicare supplements, Out of Pocket Health Insurance, Dental or Vision Insurance:

\$ \_\_\_\_\_

\*Note: if you have insurance at work, the premiums you pay may be pre-tax and cannot be used as a deduction

\*\*Do not add Medicare PART B here, this is entered separately

b.) MEDICATIONS: Prescription out of pocket cost:

\$ \_\_\_\_\_

c.) VISION: office visits, glasses, contacts cost out of pocket:

\$ \_\_\_\_\_

d.) DENTAL: office visits, procedures, dentures, implants, braces:

\$ \_\_\_\_\_

e.) MILEAGE: to and from appointments, picking up prescriptions: \_\_\_\_\_ miles

f.) SUPPLIES: Cost to modify home, grab bars, ramps, etc./crutches/walker/wheelchair/modify car/wigs: \$ \_\_\_\_\_

g.) LONG TERM CARE INSURANCE PREMIUMS YOU PAID:

\$ \_\_\_\_\_

h.) NURSING HOME/IN HOME CARE:

\$ \_\_\_\_\_

TAXPAYER SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_